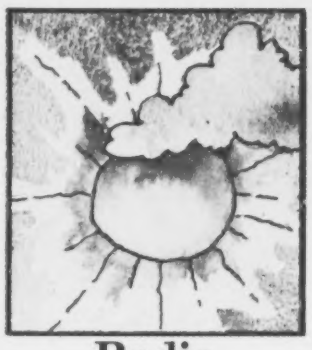
# At a glance: Media forecasts



## Radio

This over-all view became even sharper as each major media form was checked with these experts.

### Television

Every media director to whom we spoke underscores the point that usable tv alternatives continue to multiply. Cable is now available in more than 40% of U.S. tv homes and, although cable programing services are in flux, advertiser-supported cable "avails" are continuing to increase in significance.

But there is a big change in tion losses.

These factors explain why magazine rate increases in 1983 are smaller than those of most other media and why rates will only rise 7% in 1984. This increase is still slightly ahead of the general inflation rate, but the difference is smaller than all other media.

### Network tv

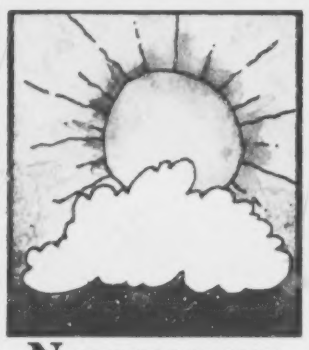
Because the number of network time slots is practically fixed while the demand has been rising, it is not surprising that the unit cost index for network tv reached 365 in 1982 when the consumer price index was only up to 289. It has been a seller's market for years, but audiences also have grown so that the high price levels are not unexpected. When audience growth is factored in, the index of cost per thousand for the networks is reduced to a level more in line with the consumer price index in 1982.

This year the tv networks are not realizing any audience growth, while inflation, as measured by the CPI, has moderated to just 3.3%. Annual network tv price increases finally have fallen below the double-digit levels of recent years,

*(Continued on Page M-20)*

## Magazines

attitudes toward the established networks this year. Marcella Rosen of N W Ayer terms it a period of "network recovery," not too surprising in her view because they were expected to fight back strenuously from the setbacks and competitive pressures of recent years. The network share erosion characteristic of the past few seasons seems to have slowed markedly —a pattern pointed out by Jay Schoenfeld of Backer & Spielvogel and confirmed by others. In a sense, this offers a reprieve for the networks, as well as other



## Newspapers

traditional tv outlets—at least through 1984.

Helping strengthen the networks' hand in the coming year is the scheduling of extensive air time for the Olympics, as well as the political conventions and the presidential campaign.

Further accenting the positive, the group agrees it is unlikely we'll see a repetition of the turmoil and aggravation of 1976, when prices escalated because large amounts of commercial inventory were unavailable. With many more alternative ways to get tv exposure now possible—and with independents showing a great deal more skill in counterprograming—these agency media heads don't foresee a seriously damaging dislocation in the tv buying marketplace for 1984. But a cloud still remains on the supply-demand front in that network costs are expected to go up significantly. Estimates center on the 15% area—and in view of the tightness of budgets, there is noticeable concern that the networks and key stations in major markets might be unrealistically short-sighted as a result.

But despite pricing irritation, another positive point is seen for traditional broadcast tv in the year ahead: A marked improvement in programing stability, a point volunteered by all but one of our panel. Led in no small measure by NBC's continued commitment to better-quality programing, there's an expectation that the new season will be more predictable and steady, improving the buying atmosphere considerably over the churning seen in the advertising market in recent seasons.

But all is not sunny and upbeat on the tv front. There's a widespread concern among our panel not only about cost escalation, but also with a resurgence of clutter as a serious headache for planners and advertisers. With deregulation sweeping the industry and with the demise of the National Assn. of Broadcasters' Code, there's renewed interest in 15-second and other short length commercials.

Combined with the moves of networks and stations to schedule additional commercial time, there's a feeling that viewer irritation, inattention and "tune-out" will increase. Six of the seven media executives made comments about "zapping"—viewers using their remote control buttons to change channels or turn the set off if they get annoyed with commercial breaks.

## Direct mail

A recent Nielsen study minimizing the importance of tune-out, while a reassurance to some, doesn't ease a great deal of anxiety about deterioration in actual exposure and attentiveness.

To several of our experts—particularly Allen Banks of Dancer Fitzgerald Sample and Joseph Ostrow of Young & Rubicam—this intensifies the need

**Although our panel members are bullish about radio, their doubts about the medium include its instability and audience tracking problems.**

for modifications in traditional audience research measurements. A majority of the panel note growing interest in the "people meter" concept, a device used in Britain that permits individual viewers to log in their presence before the tv set. Whether improved devices will permit more accurate and reliable measures of actual individual viewer availability or not, the pressure is clearly on established broadcast rating services to track actual viewing, says Gerald Moody.

Also noted was strong growth in worthwhile syndication avail-

## Out-of-home

abilities. Agencies and advertisers seem to be moving more actively into either the actual creation and financing of programing for placement on individual stations or in supporting a variety of ad hoc networks offering programs of their choice.

With the proliferation of choices in cable, pay, satellite and other electronic forms, the tv media market continues to be in flux. More experiments are noted with "crossover" programing—the adaptation of established consumer magazine material to selective cable audiences to custom-tailor new programing efforts. The accelerating moves of major media corporations into other forms—publishers into broadcasting and tv and radio interests into print —suggests much more activity in synergistic approaches.

Thus, 1984 shapes up as a particularly interesting year for tv, a category whipsawed by opposing forces.

Jay Schoenfeld sums up the crosscurrents for major national advertisers in this medium: "There doesn't seem to be a better alternative to network television—right now."

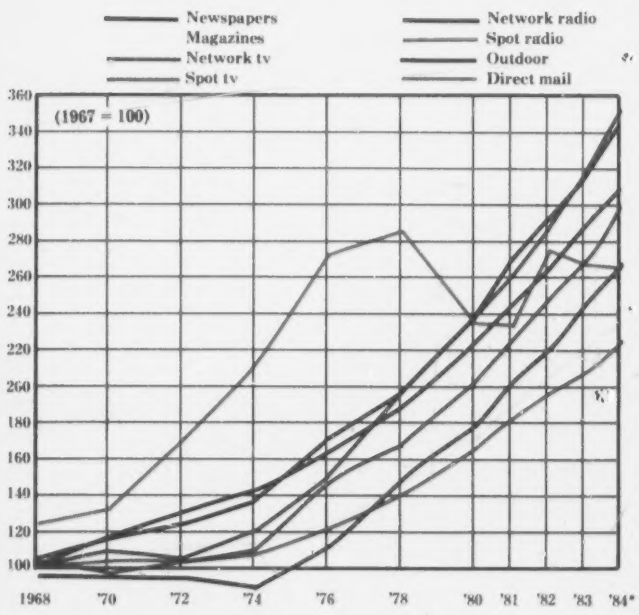
### Radio

The panel members are bullish about radio as far as national advertising is concerned in 1984. Several point out that more of their major clients are using the medium to provide weight in field tests in such markets as Kansas City, San Diego, Phoenix and Albany, N.Y.

A more widespread reason for growing client interest in radio is not so much its limited role, but because it is an attractive corrective to media problems seen

*(Continued on Page M-22)*

## Media cost per thousand indexes




*Estimated
Source: McCann-Erickson

# Our panel members

This is the fifth year that Advertising Age Magazine has carried the results of discussions between Herbert Zeltner, chairman of the Advertising Age Editorial Sounding Board, and a panel of media experts on the subject of the media outlook for the upcoming year.

This year's panel, made up of seven advertising agencies' top media executives, participated by means of extended one-on-one discussions with Mr. Zeltner. These are the members of the panel:

- **Allen Banks**, executive vp-media director, Dancer Fitzgerald Sample, New York (assisted by Betsy Frank, vp-associate research director).
- **Robert Geis**, senior vp-corporate media director, Wells, Rich, Greene, New York.
- **Kenneth Lane**, senior vp-media service division, Leo Burnett USA, Chicago.
- **Gerald Moody**, senior vp-director of marketing services, Ross Roy, Detroit.
- **Joseph Ostrow**, executive vp-director of communication services, Young & Rubicam, New York.
- **Marcella Rosen**, senior vp-media director, N W Ayer, New York.
- **Jay Schoenfeld**, senior vp-media director, Backer & Spielvogel, New York.

# Costs

*(Continued from Page M-11)*
but this has resulted mainly because of a significant shift of some buying demand from the networks to nonnetwork syndicated programs.

Buyer resistance and the uncovering of additional alternatives is holding the network tv unit increase to approximately 8% for this year.

Next year, the national elections and the Olympics will cause network prices to rise more than they would in a year when these events are not present. Thus, despite buyer resistance and an expected inflation rate of about 5%, the cost of network tv time is likely to rise at the double-digit pace of 10% in 1984. But in the following years we expect a return to more moderate price increases.

### Spot tv

Price trends in the spot or non-network sector of the tv medium are influenced by many of the same factors that effect network tv prices.

Double-digit annual price increases for spot tv announcements had been customary up to this year, when moderation returned. For 1983 as a whole, we expect the increase to average about 8%.

In 1984 the spot tv sector also will enjoy the extraordinary demand because of the elections and Olympics, and the moderation in spot rate growth also will be temporarily interrupted with a 10% price increase. In 1985 and for the rest of this decade, we expect to see spot price growth closer in line with the annual inflation rates ranging from 6% to 8%.

### Radio

Less than 10% of all radio advertising dollars are spent on the regular national radio networks, but demand for network time has been accelerating, and a growing amount of affiliate time is being turned over to the networks. This expanding demand explains why the network radio cost increase of 12% this year was the highest for all media. We believe another relatively large increase of 9% could occur in 1984.

Cost trends for the nonnetwork or spot segment of radio are heavily influenced by local business conditions, and price indexes are lower than those for the networks.

Many local retailers suffered business losses during the 1982 recession and, although conditions have improved, they are still reluctant to expand their promotional activities. For these reasons, spot radio rate increases in 1982 and 1983 have been lower than most of the other mass media. In 1984 extra political advertising and expanded promotional activity by retailers are expected to prompt a surge in demand for radio time and an accompanying rate rise of about 9%.

**Although the energy-related costs of doing business have leveled off, outdoor advertising has continued with annual double-digit rate increases.**

### Outdoor

When inflation exploded in the mid-1970s, the outdoor plant operators cited the greatly increased lighting, labor and fuel costs for their trucks as justification for very large rate increases. For nearly a decade, many plants have imposed double-digit price increases as standard operating procedure.

For the last few years many of the energy-related costs of doing business have leveled off, but many outdoor plants still had double digit rate rises in 1983.

A number of key users of the outdoor medium are reacting strongly, and it is unlikely that they will raise their budgets to accommodate such increases indefinitely. The price increases in the future should be more in line with those of the other media, although next year's election activity may hold the moderation off until 1985.

### Direct mail

From 1967 to 1978, the cost index for this medium rose faster than all the others, and growth in the number of pieces of regular third class mail slowed perceptively. But in 1979 the U.S. Postal Service initiated discounts for presorting and the cost for using the mail as an advertising medium dropped, while those for other media continued to spiral upward and eventually exceed direct mail.

The index for direct mail continued to decline through 1981, but then a sharp increase in the rate structure occurred so that the index for 1982 rose nearly 18%. However, in 1983, new discounts caused a 4% decline in unit costs.

The Postal Service has had a surplus for two years, and no significant rate increases are anticipated until possibly late in 1984, when rising operating expenses may threaten a return to deficits. But even if this does occur, the higher discounts approved this year will probably offset any increase with the result that the net change will be zero for the year.

### Summary

Price changes for each medium have differed, but they all generally correlate with inflation and the short-term shifts in media supply and demand.

The annual price rises for most major media have finally moved down into the single-digit range this year. But this is to be expected because this year's general inflation rate of about 4% is the lowest in more than a decade.

Next year the downward drift in the size of the price increases will be temporarily stalled because of the Olympics and the election campaigns. But the interruption will only be temporary. For the second half of this decade, annual inflation rates should be between 5% and 6%.

We expect advertising usage to outpace the economy, and above-average demand for time and space is likely to result in media price rises somewhat above the inflation rate. However, a growing number of new media options will arrive through new publications, the mail, more independent tv stations and cable tv. The expanded alternatives will help to keep annual media price growth within a point or two of inflation rates.

## Average annual price increases

| Prices | 1979 | 1980 | 1981 | 1982 | 1983 |
|---|---|---|---|---|---|
| Consumer prices | +11.3% | +13.5% | +10.4% | + 6.1% | + 2.3% |
| Gnp deflator | + 8.6 | + 9.2 | + 9.4 | + 6.0 | + 4.5 |
| **Media cpms** | | | | | |
| Network tv | +11.2% | + 8.7% | + 9.7% | +11.9% | + 9.0% |
| Spot tv | + 9.6 | + 9.8 | +10.9 | +11.2 | + 8.0 |
| Magazines | + 9.0 | + 9.5 | + 8.7 | + 9.0 | + 8.0 |
| Newspapers | + 9.2 | +10.3 | +11.9 | + 9.6 | + 9.0 |

Source: McCann-Erickson

## Media cpm trends (1967 = 100)*

| | 1980 | 1981 | 1982 | 1983 | 1984** |
|---|---|---|---|---|---|
| Newspapers | 235 | 263 | 288 | 314 | 340 |
| Magazines | 173 | 188 | 205 | 221 | 236 |
| Network tv | 238 | 261 | 292 | 318 | 350 |
| Spot tv | 201 | 223 | 248 | 268 | 298 |
| Network radio | 178 | 202 | 220 | 244 | 264 |
| Spot Radio | 164 | 182 | 195 | 207 | 222 |
| Outdoor | 222 | 242 | 262 | 286 | 309 |
| Direct mail | 235 | 234 | 275 | 265 | 264 |
| Composite | 217 | 231 | 261 | 272 | 288 |

*1967 used as base year (100) for measuring all media
**Estimated
Source: McCann-Erickson

## Media unit cost trends (1967 = 100)*

| | 1980 | 1981 | 1982 | 1983 | 1984** |
|---|---|---|---|---|---|
| Newspapers | 249 | 279 | 308 | 336 | 363 |
| Magazines | 183 | 201 | 219 | 237 | 253 |
| Network tv | 302 | 329 | 365 | 394 | 434 |
| Spot tv | 255 | 286 | 317 | 342 | 377 |
| Network radio | 214 | 244 | 268 | 300 | 327 |
| Spot Radio | 192 | 215 | 232 | 248 | 268 |
| Outdoor | 275 | 303 | 330 | 363 | 396 |
| Direct mail | 235 | 234 | 275 | 265 | 264 |
| Composite | 242 | 264 | 295 | 313 | 336 |

*1967 used as base year (100) for measuring all media
**Estimated
Source: McCann-Erickson

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# 'Launch fever' still lives in the magazine game

## *Look for a bundle of new publications to debut in 1984*

By Stuart J. Elliott

The magazine industry was so busy bringing out new products this year that it's surprising no slick public relations campaign has yet surfaced touting "launch fever." And by all indications, next year will be more of the same.

What follows is a look back at the major magazine startups of 1983, with a look ahead at next year.

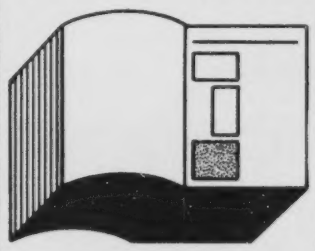
• *TV-Cable Week*: "It's the first thing that hits anyone's mind when you ask about the new magazines of '83," says Page Thompson, senior vp-media director, New York division, Needham, Harper & Steers. "Everyone looks at it and says, 'Oh, God.' "

The rise and fall of the Time Inc. weekly, which lasted five months and lost $47 million, "is a shame," says David Lehmkuhl, vp-group media director, N W Ayer, "but in a lot of ways, it's good. It shows that to launch a new magazine is a herculean chore, and that no matter how much money you put behind it, if the public doesn't want it, you aren't going to be a success. The buyer has the final say, not the agency, not the client, not even the guy who puts out the magazine. If you're not pleasing the reader, you're dead."

• *Vanity Fair*: "I happen to be one of those people who believe *Vanity Fair* is going to be successful," says Gladys Oshins, associate media director, Della Femina, Travisano & Partners.

The Conde Nast monthly made its debut—or return, if you consider its first incarnation—last March. "The recent changes made in editorial are a great improvement," says Ms. Oshins, referring to the new regime of editor-in-chief Leo Lerman, the replacement for the first editor-in-chief, Richard Locke, who was fired.

Mr. Lehmkuhl echoes her thoughts. "I think it's great and is going to be a huge success," he says, "because it is simply filling a void. The audience to whom



it's aimed is an ideal audience for any quality goods." While he also agrees the magazine has improved, "it was not that bad at first," he contends. "I think the 'shaky start' was more critical than real. It was not really shaky, if you read the first three issues."

But to Mr. Thompson, *Vanity Fair* "is a really tough call right now. To keep the audience coming back, you need a clearly defined position.

"Like it or not, the advertising community looks at publications and often visualizes the positioning. I think *Vanity Fair* is still searching for it. That kind of publication needs time—I'm not talking two years, I'm talking a long time."

• *House & Garden*: Another Conde Nast venture, technically not a launch because the magazine is a longtime title. With the January issue it was revamped into a more upscale publication to challenge Knapp Communications' *Architectural Digest*.

"Certainly the marketplace can be served by more than just *Architectural Digest*," says Ms. Oshins. "It looks like it's going to be successful." The new *House & Garden* "is a very classy-looking publication," says Mr. Thompson. "I think they really have something, though they have to fine-tune it."

William Bondlow, *House & Garden's* publisher, asks rhetorically, "Is there really room for another upscale magazine? The circulations of *House & Garden, Architectural Digest, Connoisseur* and *Town & Country* don't begin to approach the 5 million homes with $50,000-plus household income, a figure that's growing. So there *is* room for expansion."

As each issue of the remade *House & Garden* comes out, "the total package looks better and better," says Mr. Bondlow. "It's shaking out very, very well." While total ad pages this year won't equal the 965 sold in 1982, when the magazine was for more of a general audience, display pages will top 800, he says, compared with the 722 display pages carried in 1982.

• *M*: The Fairchild Publications monthly, meant to capture an audience of older, more affluent men, made its debut with an October issue. "I was a bit surprised it was as fashion-oriented as it is," says Ms. Oshins. "If it's tailored to the older man, and it continues to be fashion and so-

**"To launch a new magazine is a herculean chore, and no matter how much money you put behind it, if the public doesn't want it, you aren't going to be a success."**

*Stuart J. Elliott is a reporter in the New York bureau of* ADVERTISING AGE.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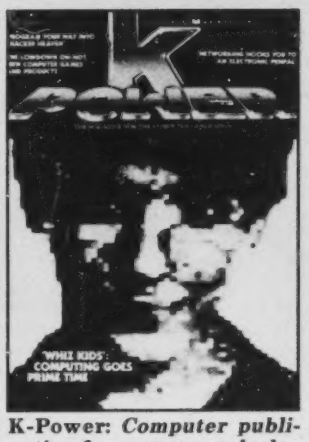
**Vanity Fair:** ***Opinions about its future vary among agency people.***

**House & Garden:** ***Revamped into a more upscale publication in '83.***




**K-Power:** ***Computer publication for young people due out in'84.***

**Family Computing:** ***Part of the "tidal wave" of computer books.***

**Sportstyle:** ***The Fairchild publication has called it quits.***

cially directed, they may have a problem. I'm not sure the older male audience is that interested in fashion; it's different among younger men."

While *M* needs to find "the right mailing list and subscribers," says Mr. Lehmkuhl, "they certainly have a package to take out and sell. It's neat and well done. If John Fairchild can't put out a fashion book, who the hell can? It could be another *Vogue*."

• *Sportstyle*: This monthly for enthusiasts of active sports, also from Fairchild, came out in March. The ad community seemed less than enthused with it, however, and there were changes in editorial and cuts in rate base and ad rates. "I don't really hold out too much hope," Ms. Oshins said in October. "I don't really know what they're trying to accomplish."

Mr. Lehmkuhl "liked where it was when it came out," he says, "and I am getting a lot less enthralled with it. I, in fact, subscribed to it, and now I regret paying the 12 bucks."

Apparently other readers and advertisers had similar feelings. Fairchild recently announced that *Sportstyle* would cease publication after the December issue, a victim of the magazine wars after less than one year in the marketplace.

• *XL*: Introduced in August by Power Publishing, *XL* is a general interest men's monthly that, to paraphrase the late-night tv pitch, is not available at all stores. In fact, it's only on sale at Southland Corp. 7-Elevens. The goal is to replicate the success enjoyed by the women's service magazines sold mostly at supermarkets, *Family Circle* and *Woman's Day*. "It's a fascinating concept," says Mr. Thompson.

**_One new entry, XL,_ a general interest men's monthly, is available only in 7-Eleven stores. Another, _Sportstyle_, lasted less than one year before ceasing publication.**

• Computer magazines: A veritable tidal wave of new titles is pouring from this category, including several Ziff-Davis Publications titles spun off from *PC*; David Bunnell's *PC World*; Scholastic's *Family Computing*, *Teaching & Computers* and *Electronic Learning*; *Personal Software*; *Enter* and *Microkids*.

"There are new ones every other day," says Mr. Thompson. "A lot of these people thought, 'This is a new area,' and they all jumped in. But it's going to shake out, like the computer industry."

This is "one category where there could really be survival of the fittest," says Mr. Lehmkuhl. "The ones with the most money can hang on and, if you can hang on, three-quarters will fall by the wayside."

One of those hoping on land among the other one-quarter is Eileen Markowitz, general manager of the Ziff-Davis consumer computers and electronics mag-

*(Continued on Page M-40)*

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# Can *Inside Sports* make it this time around?

By Neesa Sweet

Has *Inside Sports* been born again? That's what the tag line on the ads for *Inside Sports* magazine is saying these days. The question is, can Norm Jacobs of Century Publishing of Evanston, Ill., succeed where the Washington Post Co. and Active Markets already have failed?

In 1979, the Post Co. started *Inside Sports* as a more in-depth publication than Time Inc.'s *Sports Illustrated*. Last year, publication ceased, and the national press was treated to the spectacle of more than 60 employes, originally hired by the Post Co. and Bellevue, Wash.-based Active Markets, refusing to leave a Manhattan bank unless their paychecks were cashed first.

That's hardly the stuff of glory. But, despite that, says Mr. Jacobs, when he looked at the magazine's history, what he actually found was a success story. It all depends, he suggests, on your interpretation of failure.

*Neesa Sweet is a Chicago-based free lance writer.*

*Inside Sports* was launched by the Post Co. as a magazine that would look at sports as a culture. Using high-quality writers and graphics, it was to go beyond scores and game analysis to the life styles of the people involved.

In 1979, a total of 125,000 copies of a test issue were placed on newstands in the East with a cover price of $2, and 80% were sold. The magazine's rate base was set at 550,000 and in December, 1980, the Audit Bureau of Circulations audit placed circulation at 450,000. Ultimately, circulation grew to 541,000, but that number fell 9,000 short of the announced advertising rate base.

"For any other company, that would have been a success story," says Mr. Jacobs. "But *Newsweek* [which the Post Co. owns] felt that they could sell a million or more copies on the newsstand.

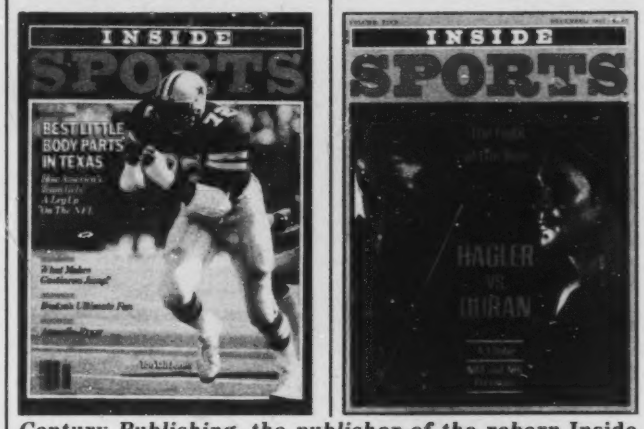
"The original goal was to compete directly with *Sports Illustrated*, and they geared up their entire operation to that size publication. They had to switch horses in midstream and start developing subscriptions."

The rate base failure was a big disappointment. And then the Washington Post Co. took a close look at *Inside Sports* and decided to fold the magazine or sell it.

At this point, Active Markets, which published an athletic magazine for high school students, decided to negotiate and buy the magazine.

It was backed by venture capital, and it publi[illegible] first issue in January, 1982.

According to Mr. Jacobs, Active Markets took over the entire staff, which was still housed in *Newsweek* offices, and, in addition, it started building its own staff in Bellevue, Wash.




***Century Publishing, the publisher of the reborn* Inside Sports, *(right) has kept the appearance similar to when the magazine was part of the Washington Post Co. or Active Markets (left) stables.***

But the advertising community pulled back on its schedules, and the money Active Markets had budgeted suddenly wasn't enough.

By fall of 1982, it ran out of funds and had to shut down. That was when all those people went to the bank.

"When we learned the magazine had folded, we called Active Markets to see if we could buy their subscription files," says Mr. Jacobs. "At first we didn't hear from them. But in January, their Midwest manager called me. Apparently, they'd been running all over the country trying to sell the title, the magazine

## Launches

*(Continued from Page M-39)*

azine division. "There will be a number of successful microcomputer manufacturers," she says, "and there will always be a need and interest on the part of the readers for magazines dedicated to their particular computers." The Ziff-Davis formula is to segment the market by manufacturer, producing publications such as *PC*, specifically for International Business Machines Corp.'s Personal Computer, and then segment the market within those segments, producing *PC* spinoffs such as *PC Tech Journal* and *PC Week*.

Another entrant who wants to be among the survivors in this category is Shirrel Rhoades, vp-publisher of Scholastic's *Family Computing*. "It's very clear Scholastic is committed to the computer and its impact on education and family life," he says. The company's lineup—three

**Advertising revenue**

| Ranks 1982 | Ranks 1981 | Market name | Ad Rev. ($000) |
|---|---|---|---|
| 1 | 1 | Weeklies | 1,702,762 |
| 2 | 4 | Newsmagazines | 698,477 |
| 3 | 2 | Affluence | 698,276 |
| 4 | 3 | Women's Service | 628,926 |
| 5 | 5 | Business General | 353,405 |
| 6 | 8 | Women's Lifestyle | 323,614 |
| 7 | 6 | Home Service | 295,316 |
| 8 | 7 | Sunday Syndicated | 258,676 |
| 9 | 9 | Sports | 257,915 |
| 10 | 10 | General Interest Literature | 224,711 |
| 11 | 11 | City Regional | 177,480 |
| 12 | 12 | Women's Fashion | 144,782 |
| 13 | 13 | Men's Lifestyle | 132,536 |
| 14 | 14 | Men's Entertainment | 107,009 |
| 15 | 15 | General Interest Humanities | 83,680 |
| 16 | 17 | Automotive | 72,891 |
| 17 | 16 | Men's Service | 68,709 |
| 18 | 18 | Outdoor | 68,033 |
| 19 | 19 | Sciences (General) | 59,529 |
| 20 | *n.i. | Computers: Personal & Home | 47,433 |
| 21 | 20 | Black Ethnic | 44,875 |
| 22 | 26 | Personal Finance | 43,869 |
| 23 | 22 | Culinary | 38,508 |
| 24 | 23 | Youth | 38,106 |
| 25 | 25 | Travel | 36,226 |
| 26 | *n.i. | Health & Fitness | 34,134 |
| 27 | 21 | Women's Special Interest | 31,010 |
| 28 | 28 | Bridal | 30,350 |
| 29 | 24 | Inflight | 30,065 |
| 30 | 29 | Business Financial | 29,052 |
| 31 | 30 | Lifestyle Self Sufficiency | 18,822 |
| 32 | 31 | Business Professional Svcs. | 17,480 |
| 33 | *n.i. | Maturity | 11,360 |

Figures are for calendar 1982 *n.i. = not included in the last Folio 400

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THANK YOU, BELDEN!

After a long-awaited update, Belden Associates, of Dallas, has begun a continuing market study of the 8-county Bangor (ME) RTZ and Bangor Daily News readership. We're proud to report the following results:

| NEWS Readership | Percent of 8 counties |
|---|---|
| Adult Daily Readership | 54% |
| Adult Weekend Readership | 63% |
| Adult Male Daily Readership | 55% |
| Adult Female Daily Readership | 53% |
| Adult Daily Readership 25-49 | 51% |
| Adult Daily Readership $25,000+ | 65% |

169,000 Daily Readers/198,000 Weekend Readers.
For complete market information about the Bangor RTZ and Northern New England's Largest Daily Newspaper, contact Roger K. Choquet, (207) 942-4881 or your Sawyer-Ferguson-Walker representative.

BANGOR DAILY NEWS
THE BETTER BUY IS BANGOR
Northern New England's Largest Daily Newspaper
Source: Bangor Continuing Market Study, Belden Associates, March-May, 1983.

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and the company without much success."

So Mr. Jacobs took a look at the offer. And this, he says, led him to a discovery. "When I started to look at the property, what I really found was a success story," he notes.

"That seems strange in that the company was in the throes of bankruptcy, but I saw that *Inside Sports* had sold more copies on the newsstands than any other sports magazine in history, including *Sports Illustrated, Sport, Baseball Digest* or anything else. The articles were personal, in-depth and by major writers. Graphically, it was a fine publication. In addition, *Newsweek* had already invested some $25 million and had developed a brand name awareness. My decision to buy the company was influenced by this investment in quality."

Why does Mr. Jacobs think he can make a success of the venture when the other two companies couldn't?

"For one thing, *Newsweek* had very high sights and switched management in midstream. Any other publisher would have been delighted with the progress made in a year and a half," Mr. Jacobs says. Active Markets, he believes, was undercapitalized.

As for Century Publishing, *Inside Sports* fits right in to its plans.

"We publish seven national sports magazines—vertical magazines, each covering just one sport—with a [combined] paid circulation of 877,000," says Mr. Jacobs. "For the last several years, we've thought of starting a broad-based general interest sports magazine to complement our lineup."

Mr. Jacobs did not rehire the 60-plus people who had worked for the old *Inside Sports*. Instead he opened New York and Los Angeles sales offices and added a few support staff in Evanston. Free lancers, many who contributed to *Inside Sports* previously, are writing most of the magazine.

According to Mr. Jacobs, there is very little difference in the look and content of the new book.

"We purposely wanted to keep everything much the same," he says. "We did research, talked to newsstand distributors, retailers, editors, readers, advertising and marketing people and found that everyone loved the magazine. So the logo is the same, the departments are intact and the design is the same as before."

"We offered free ads to advertisers on a month-for-month basis," says Mr. Jacobs. "Any advertisers running ads in the four issues which are coming out in 1983 would have free space if they agreed to run the same space in 1984 on a paid basis. To participate in the program, advertisers had to agree to come in at least the first two issues.

"We utilize that plan to overcome the 'what makes you think you can do it when *Newsweek* couldn't do it?' objection. What we're saying is that you don't have to risk your money in determining whether we can do it or not. If we're not around in 1984, there won't be any liability."

Mr. Jacobs has guaranteed a conservative rate base of 200,000 and says he already has 30,000 subscribers in place. Advertisers for the October issue included Adidas, Nautilus, Northwestern Mutual Life Insurance, Mennen and J.C.Penney.

magazines launched this year, at least two due out next—"sounds pretty ambitious," he says, "but if it's crazy, it's smart crazy."

And what of next year? "There will always be more launches," says Ms. Oshins, "particularly in the special interest areas in the upper end of the scale, delivering smaller circulation bases. From where I sit, it seems the magazine industry, which had a good '83, will continue to have a good '84." NH&S, according to Mr. Thompson, is "looking at expanding a lot of our clients into magazines" next year.

These are among the publications scheduled to be launched in 1984:

- *Adam Family Computing*, from Scholastic, due in January or February, tied to Coleco's new Adam computer system.
- *Art & Antiques*, from Allison Publications, due in February, actually a relaunch of a trade magazine that will be reborn as an upscale general interest consumer publication.
- *Chocolatier*, from Haymarket Ltd., due in January, for chocolate lovers.
- *K-Power*, from Scholastic, due in January, for teens and preteens proficient in computer usage.
- *Home Computer Review*, from Viare Publishing, due in February, for prospective buyers of home computers.
- *New England Monthly*, from New England Monthly Inc., due in April, for residents and devotees of that region.
- *PC Home Computing*, from Ziff-Davis, due in January, another spinoff from *PC*, aimed at home users of the IBM Personal Computer.


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# Why marketers like the sales promotion gambit

## *Its advantages often overshadow the attraction of advertising*

By Don E. Schultz

Over the past few years, there has been increasing concern among advertising managers and agencies, and increasing glee among sales promotion managers and organizations, over the shift of funds from media advertising to sales promotion activities. Where 15 to 20 years ago advertising accounted for the lion's share of most national marketers' budgets, sales promotion now is commonly the dominant force. The graph below illustrates the share of advertising and sales promotion investment by U.S. marketers.

While much attention has been given to the shift, seemingly little has been done to discover why this change has occurred and even less to whether the trend is likely to continue. This reallocation of funds is an important issue for all marketers but particularly those who are or have been committed to investing the majority of their funds in traditional media advertising. By taking a look at what is driving the growth of sales promotion, perhaps it will give marketers some view of what is likely to happen.

**In fact, it may well be that manufacturer-originated advertising has reached its high-water mark and will continue to decline as a percentage of total marketing investment for the rest of the century.**

There appear to be some definite reasons marketers shifted from media advertising to sales promotion in the 1970s. There are some even more compelling reasons why that shift will probably continue. In fact, it may well be that manufacturer-originated media advertising has reached its high-water mark and will continue to decline as a percentage of total marketing investment for the rest of this century.

### Why the shift in the 1970s

The shift in emphasis from advertising to sales promotion seems really to have started in the early to mid-1970s. The factors that contributed to this reallocation of funds were:

• **Increase in short-term marketing management view.** Management's approach to marketing almost dictated the shift in emphasis from media advertising to sales promotion during the past decade. From the time right after World War II up until the early 1980s, the American market grew almost constantly. Management became accustomed to that and assumed it would continue indefinitely. As a result, most management and particularly most marketing reward systems were predicated on continuing growth and prosperity.

Pay scales and promotions were based on sales volume increases not only for the coming year but even for the next quarter. Management developed an increasingly short-term view of success, and that view permeated the entire organization. In marketing, the product or brand manager's basic job became "make the figures and get promoted." Top management's view didn't seem to be that much different because everyone assumed a naturally expanding marketplace in the future.

With this short-term managerial view, sales promotion naturally became a favored technique in the marketing mix. Because the definition of sales promotion is a "short-term incentive to purchase," it filled all the fast-track manager's needs. It was easy to implement; it got immediate response, particularly with the trade, and most of all, it was measurable and visible when compared with traditional ad campaigns.

Where often advertising took time to build and the results weren't always clear, the product manager could quickly see the results of sales promotion and those results could be measured in cases, dollars, return on investment and the like. Sales promotion seems to have been ready-made for the manager with a short-range view. It was and still is being used in exactly that same way.

• **More parity products.** In the 1970s, fewer and fewer really new products came to market. Most established brands were at parity with competition. Product managers found it harder and harder to differentiate their brands in the marketplace. With no visible or inherent difference in the product to advertise, even the advertising began to look the same. The easy way for brand managers to differentiate their products was through sales promotion. The marketing credo became: "If you can't improve or differentiate the product, differentiate it with sales promotion."

For example, the promotional message to the consumer, as well as the trade, became "now our brand has a premium" or "look for our coupon" or "enter our sweepstakes." Sales promotion offered the volume-hungry product manager a quick and easy fix in the marketplace for a product that was just about the same as everyone else's. And many product managers took advantage of the techniques available, commonly shifting money from advertising to sales promotion. From there, the practice simply grew.

**Where often advertising took time to build and the results weren't always clear, the results of sales promotions could be measured in cases, dollars, return on investment and the like.**

• **Sales force pressure.** One of the outgrowths of management's short-term view was to put increased pressure on the sales force to move these parity products in greater volume, particularly to the trade. The sales force's natural response was to request greater and greater trade incentives, commonly in the form of price concessions. Because of almost constantly escalating product costs as a result of inflation, marketing management's answer was to manipulate the product price through sales promotion techniques, rather than through actual price list changes. These sales promotion programs took many forms: Off-invoice allowances; bill-backs; volume, stocking and display allowances; trade coupons, and rebates all became common tactics in the brand manager's promotional program.

• **Consumers and the economy.** One of the most obvious factors influencing the increased use of sales promotion, although not necessarily the most dominant, was the economic situation from the mid-1970s through today. As consumers became hard-pressed financially because of inflation, a stagnant economy and unemployment, they naturally sought out and used the various price-reducing sales promotion programs that were being offered by product manufacturers. These helped them cope economically. As marketers saw sales promotion give them big sales boosts, compared with the results they received from advertising, they naturally increased the use of sales promotion. Thus, the consumer sales promotion spiral grew.

Similar to the situation with the trade, the easiest way to get more sales promotion money was to take funds already allocated for advertising and simply shift them to sales promotion. The result? More money in consumer promotion and less money in consumer media advertising.

### The future

Some of the four factors listed above will likely diminish in importance as decision points in the future. Already, inflation, particularly in the U.S., seems to be under control. There is also some evidence that marketing management, at least at the upper levels, may well have learned its lesson on "sales at any price." The era of parity products and particularly pressure from the sales force, however, is far from over. In addition, there are four other factors that will continue to encourage marketing management to invest a larger share of the over-all promotional budget in sales promotion in the next decade or so.

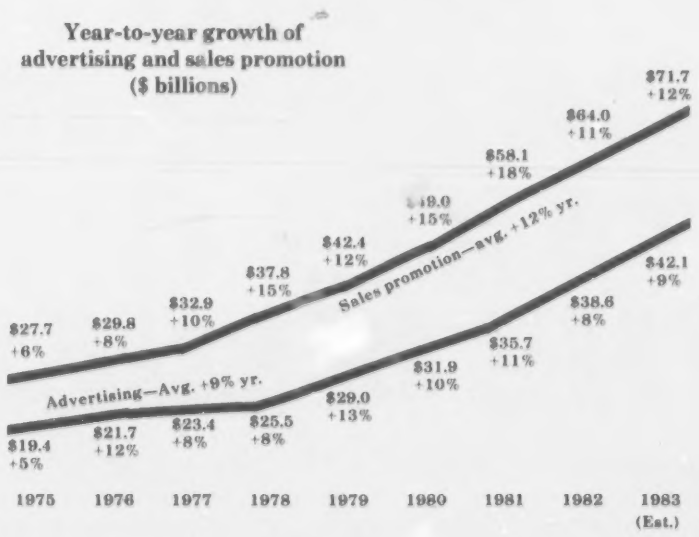
• **Increasing trade concentration.** The increasing concentration of the retail trade into a few dominant chains and buying groups will likely force manufacturers to increase their investment in sales promotion. There is little question that marketplace control has shifted from the manufacturer to the retailer. This is clearly evident in the consumer's shift in allegiance from national brands to private labels and generics over the past few years. It's becoming more obvious that the consumer puts most of his or her faith in Kroger or Safeway or Walgreens or Osco rather than in General Foods or General Mills or Pillsbury or other manufacturers of national brands. And local retailer control of the marketplace is only going to increase in the future.

The result of this marketplace power shift is already well known to many product manufacturers. In many local markets today, the retail trade now dictates to the manufacturer what he must provide in the way of price and promotion simply to get the product stocked in the retail store.

As the retailer's power increases, there will be additional pressure on the manufacturer to provide more trade deals, trade coupons, co-op advertising allowances and the like. While the retail trade recognizes the need for the manufacturer to presell and gain acceptance with the consumer through advertising, the retailer's primary concern is quite different. He's really interested in what he can do to differentiate himself from his local competition. That generally is accomplished through vari-

*(Continued on Page M-54)*

## Growth of advertising and sales promotion




**Source:** Russell D. Bowman, vp, John Blair Marketing, New York. First appeared in *Marketing Communications.*

*Don E. Schultz is associate professor of advertising at Northwestern University's Medill School of Journalism, Evanston, Ill.*

# Promotion

*(Continued from Page M-52)*

ious forms of pricing and selection differentiation along with local promotional activities. It is not accomplished simply through stocking nationally advertised brands.

Thus, the increased concentration and the increasing power of the retail trade in the marketplace will likely dictate that manufacturers continue to shift funds in their promotional budgets from advertising to sales promotion simply to make sure their brands are available at retail.

• **Increasing media diffusion.** Over the past 100 years or so, media have been used to aggregate markets. In the past five to seven years, however, the trend has been to use the media to segment markets.

The result nas been a diffusion of the media's capabilities, and this is quite likely to continue. We're already seeing increased segmentation of audiences through specialized magazine and radio formats. Narrowcasting in tv and cable is just beginning.

As the audience continues to be split up, it will become more difficult for a major advertiser to make use of the mass media. In addition, as the media continue to segment the audience, it becomes more and more costly for manufacturers to reach all the various segments who might be prospects.

Therefore, it seems only natural that advertisers will start to develop more specialized and localized promotions that would provide a more cost-effective method of reaching their customers and prospects than through traditional media advertising. As media further segment audiences, the likelihood of increased emphasis on sales promotion will continue to grow.

• **More localized promotional planning.** As a direct result of trade concentration and media diffusion, more national advertisers are developing local or regional marketing plans. They are seeking to get closer and closer to their customers.

Additionally, marketers are confirming more and more that there are no truly national brands. Even those products and brands with the strongest consumer franchises have weak consumer segments and weak geographic markets.

As the demand for more localized marketing by the traditionally large national advertisers develops, the incentive to use sales promotion will increase.

Smaller, segmented target groups generally respond well to sales promotion activities, and developing an initial sales promotion program is certainly less expensive than developing an advertising program. The increasing power of the trade will also fuel this need for more localized marketing efforts, which also greatly favor sales promotion techniques over advertising.

• **Measurement capabilities.** Because of the forms and techniques of sales promotion, the increasing use of Universal Product Codes and scanners to gather sales data at the retail level greatly favors measurement of sales promotion rather than advertising. Traditionally, management has favored those approaches that can be measured over those that cannot.

**With the retailer's inclination to favor sales promotion over manufacturer-initiated advertising, the information passed along to the manufacturer will most likely be biased toward sales promotion.**

Therefore, one of the major advantages sales promotion has and will have over media advertising in the future is simply that sales promotion can be measured easily and advertising can't or is much more difficult to do.

Another factor to help fuel sales promotion growth is that most scanner results will be in the hands of the retailer, not the manufacturer. Even today, many manufacturers find that retailers, because they have the data, know much more about the success of their various promotional efforts than they do, even though the manufacturer may have initiated the event. With the retailer's natural inclination to favor sales promotion over manufacturer-initiated media advertising, the information passed along to the manufacturer will most likely be biased toward sales promotion. And, as the retailer's influence on the manufacturer's promotional efforts increases, the pressure for sales promotion funds will likely increase too.

### There are hazards, too

Based on the factors outlined above, the shift in manufacturer-originated marketing funds from media advertising to sales promotion will most likely continue in the future. This shift, however, raises some basic questions and hazards for marketing management, particularly as it relates to advertising investments.

• **Potential decline in brand franchise.** Advertising is generally considered to be the basic method of implanting ideas and attitudes about products in the minds of consumers. With a major shift in emphasis by a manufacturer to sales promotion, there is great danger that the consumer brand franchise may be lost. If the brand franchise declines, the growth of private label and generics seems inevitable.

**The factors that initiated the shift by national marketers from advertising to sales promotion are still there. Other factors almost mandate that the budget share devoted to sales promotion will increase.**

• **You can overdo sales promotion.** If carried too far, sales promotion can actually hurt not only the brand, but the entire category as well. A prime example is the bar soap category. Several years ago, it appears, manufacturers of bar soap decided rather than competing in advertising, they would compete in sales promotion.

The prime tactic was the bonus pack, *i.e.*, banded packs of individual bars that offered either a free bar or a reduced price on multiple bar purchases. Eventually, almost all manufacturers entered the fray, each one trying to outdo the others. As a result, the price of almost all bar soaps was footballed with sales promotion over the years to the point that most consumers really didn't know the actual value of any brand.

When manufacturers attempted to return to what they considered to be regular pricing, sales dropped. Consumers had no basis for evaluation, plus they were confident that another promotion would come along soon. Now, one of the costs of doing business in the bar soap category is the sales promotion bonus pack. That's a marketing cost over which the manufacturer now has little control, and it's one that really doesn't provide him with additional sales, either.

• **Increased price competition.** The very nature of sales promotion (a short-term incentive to purchase offered by the manufacturer or seller) is always some sort of price incentive, *i.e.*, the price is reduced in cash or the product or the price is compromised through the offer of a premium, prize or the like. Therefore, when a manufacturer shifts emphasis from advertising to sales promotion, he is identifying his competitive arena as price and price alone. And we all know what can happen when there is unrestricted price competition in a category.

Thus, by its very nature, an increase in sales promotion activity by the manufacturer really determines the competitive arena for the brand. If that is the marketer's conscious decision, fine. Unfortunately, too many marketers seem to lose sight of exactly what a shift to increased sales promotion and away from advertising can mean to the future of the brand. Sales promotion means price competition, and long-term straight price competition generally means problems.

There is little question sales promotion will continue to grow as a larger and larger portion of the marketer's promotional investment. The factors that initiated the shift by national marketers from advertising to sales promotion are still there. Additionally, there are other factors that almost mandate that the share of the marketing budget devoted to sales promotion activities increase in the future. But that shift comes with an inherent risk for marketing management. Whatever your position in the marketing management hierarchy, you must have a clear picture of what is driving and will continue to drive sales promotion expenditures in the future. And you should be aware of the risks of the conversion of media advertising funds to sales promotion. The risks are too great to proceed without some guidance.

# Potboiler

*(Continued from Page M-5)*

bidding. Avon prevailed. Ms. Singer and Evans split the money. And Mr. Katz was able to finance his campaign.

Mr. Katz had already worked out a strategy with Mr. Atkatz of Franklin Spier. "Yearning," Mr. Katz says, "is the common denominator. All of these books are about yearning. It bypasses literature completely. The impulse of where it works best is to tell another woman a story that moves her completely."

Roughly three-quarters of Evans' money would go toward print advertising. The balance would be spent on 60-second radio commercials to be aired in New York, Los Angeles and Chicago.

To herald the book, Mr. Atkatz prepared a two-page spread for *Publishers Weekly*. It appeared in October, four months before publication. It told of "the poor little rich girls whose tempestuous, often tortured lives are recycled into media fantasies of wealth, glamor and decadence."

In November, the 20 representatives gathered in New York. Mr. Katz decided to take the chance and show them copies of the book. Ads appeared in 13 newspapers and their book review supplements. The radio campaign began. Listeners were placed at the Plaza Hotel on the night of a debutante ball. They heard the limousines arrive and the names of the more celebrated young women whispered. And then they heard about the relationship of one woman whose "heart belongs to daddy." "The innuendo," says Mr. Katz, "was unmistakable." By February, 35,000 advance copies had been sold, and the book also had received some usable praise. In a review, *Cosmopolitan* wrote that the book "has a goodly share of lurid drama but basically this is a hot tub of fantasy and none the worse for it."

Mr. Katz acknowledges that Ms. Singer remains a "paperback" author. There is a difference, after all, in the author whose books can attract readers willing to pay $13.95 a copy and those whose books sell for $3.95. But that is something he is working to change.

In July, Avon released its paperback version of "The Debutantes," replete with a spicier cover—the faces of the four characters were replaced by a portrait of a willowy brunet whose face was used as the background for the bookstore stand. Avon spent more than $100,000 on its campaign. The bulk of that money went toward full-page ads in such magazines as *Cosmopolitan*, *Harper's Bazaar*, *New Woman*, *Interview* and *Vogue*, as well as *True Confessions*, *True Romance*, *True Experience* and *Modern Romance*.

But Mr. Katz was already looking beyond "The Debutantes." Although he thought it necessary to first produce a hardbound copy of the book to give it the sort of respectability not accorded to paperbacks, his sales did not go beyond the initial 35,000 copies. The money for this first book, he says, was going to be made in the reprinting sales.

Now, however, with the publication of Ms. Singer's second novel, the focus of the selling has changed to the author herself. In August, in the *Times* book review, Evans took a full-page ad to announce the arrival of "Star Dreams," by "a new superstar [who] rivals the dazzle of Danielle Steel and Judith Krantz."

Mr. Katz says that he wanted Mr. Atkatz to prepare an ad that read like a profile in *People* magazine. The result tells not only how Ms. Singer "burst onto the scene," but that reviewers had found in her work "minimum sentiment and maximum spice."

All of this did not sit well with Ms. Singer. "I was a little upset," she says. "I like to think of myself in the business end, but I don't know if this was right. But he insisted that my name was important to the book."

Still, Ms. Singer and her family have moved from their apartment to a 14-room home in the Bel Air section of Los Angeles. She is completing her third novel. The writing, she says, has come more quickly. And though now there are radio, tv and bookstore appearances that take her away from her work, she acknowledges they're all necessary.

Perhaps Mr. Katz will indeed produce in Ms. Singer the sort of writer whose name on the jacket can mean a best seller. And for her part, Ms. Singer is content to stay within her chosen genre. "I have no desire to write 'better' books," she says, casting her lot with one of the book business' closest approximations of a sure thing.

# 'S-T' sale

(Continued from Page 1)

outrageous, *New York Post*.

The generous use of promotions and advertising here would mirror Mr. Murdoch's moves in New York and Boston. In those cities he quickly pumped up circulation of the ailing newspapers he had purchased by using a host of such marketing methods.

Since Mr. Murdoch bought the *Boston Herald*, in early 1983, circulation has jumped from 228,228 to 317,612. The *Post's* numbers hover at 962,000 and both tabloids are running highly promoted "Wingo" numbers contests.

Some newspaper executives contend the introduction of such "Wingo" game tactics is a given for the *Sun-Times*, but they and major local advertisers are waiting to see if Mr. Murdoch will attempt to lure readers by using the sensationalist tabloid methods appearing in New York and San Antonio.

The *Post* and *San Antonio Express* and *News*, two other News America holdings, rely on bold headlines, human-interest stories and bathing beauties to attract readers.

"We don't know what he's going to do," commented a *Tribune* executive. "But he didn't spend $90 million to keep the status quo."

"Murdoch's got deep pockets," says one *Sun-Times* executive. "There was some concern that if Hoge got the paper he wouldn't have the money to back it up."

In a letter of intent to Field Enterprises owners Marshall and Frederick Field, Mr. Murdoch stated that News America did not "intend any substantial changes in the newspaper and we would strive to maintain the newspaper's high standards and reputation in the community."

Local advertisers have adopted a "wait and see" attitude. Dennis Bookshester, president-ceo of Carson Pirie Scott & Co.'s department store division, said his company hopes the *Sun-Times* will continue to go after the upscale audience.

"It should stay on the track that it has been on," said Mr. Bookshester. "That is the audience we want to talk to in the marketplace." At Marshall Field's, Marilyn Levey, vp-advertising, also said the retailer wanted Chicago to have two newspapers competing for the same higher income audience. Messrs. Murdoch and Hoge visited Philip Miller, chairman of Marshall Field's, the day the sale was announced.

The visit was "to assure us that no significant changes will be made," said Mr. Miller.

Claude Hinton, director of advertising for Walgreen's Drug Stores, Deerfield, Ill., said his company would look favorably on the *Sun-Times* if it separated itself more from the *Tribune's* readership and lessened reader duplication. Most of Walgreen's stores are located within the city limits.

Newspaper executives who have competed with Mr. Murdoch contend he will do just that by fostering a tabloid similar to his other properties.

"Its too much of a temptation for him to go to Chicago and not run the type of tabloid he is used to putting out," says Arthur Wible, exec vp-director of sales for the *New York Daily News*.

Others point to Texas. Up until this year the *San Antonio Express* had been developed into a newspaper targeted to the upscale audience. But Mr. Murdoch abandoned that market, which had not grown significantly in the recession, and came back with a racier tabloid that features shorter stories, splashier graphics and front-page headlines like "Woman Shot, Head Cut Off."

What may discourage that tack is that the *Sun-Times* is the first profitable domestic newspaper Mr. Murdoch has purchased. Management estimates the *Sun-Times* had net income of $4 million on $185 million in revenues for fiscal 1983 (ending Sept. 30).

John Reidy, an industry analyst with Drexel Burnham Lambert, said that he expects the *Sun-Times* would be infused with some of the "peppy" journalistic measures that were characteristic of other Murdoch papers, but he acknowledged that the *Sun-Times* might provide a unique opportunity for Mr. Murdoch in this country.

"Although his papers in New York and Boston have increased their circulations, they really haven't gotten the broad retail support yet that they need," said Mr. Reidy. "The *Sun-Times* already has a considerable base in that area, and if he can build on that, he might have a really good investment for himself."

Mr. Reidy predicted that, while Chicago readers might not get the wholesale *New York Post*-style treatment in the Murdoch-owned *Sun-Times*, some familiar characteristics are sure to show up.

"Murdoch has his own colorful way of presenting the news, and I expect some of that will pop up in the *Sun-Times*," Mr. Reidy said.

When Field Enterprises announced in April that it was liquidating and selling off its assets, coowner Marshall Field said that Mr. Murdoch would not be a candidate to purchase the newspaper

**In a somber mood** during the press conference where Rupert Murdoch announced the purchase of the *Chicago Sun-Times* were owner Marshall Field V (left) and publisher James Hoge.

Mr. Hoge, the unsuccessful bidder, said last week he will remain as the newspaper's publisher for the time being.

Marshall and Frederick Field, half brothers, each of whom owns 50% of the company's voting stock, had decided to pursue their separate interests.

It is the combination of Mr. Murdoch's hefty bid and Frederick Field's desire to get the highest market price that gave Mr. Murdoch another U.S. property.

"It took control out of my hands," Marshall Field told reporters and then added, "I think he's going to give the *Tribune* hell."#

*Also contributing to this story: Stuart Emmrich in New York and Tom Bayer in Dallas.*

## Ten largest daily papers

By circulation

| Paper | 1983 | 1982 | Change |
|---|---|---|---|
| *Wall Street Journal* | 2,020,132 | 1,925,722 | +4.9% |
| *New York News* | 1,395,504 | 1,544,101 | −9.6% |
| *Los Angeles Times* | 1,038,499 | 1,052,637 | −1.3% |
| *New York Post* | 962,078 | 960,120 | 0.2% |
| *New York Times* | 910,538 | 905,675 | +0.5% |
| *Chicago Tribune* | 751,024 | 758,255 | −0.9% |
| *Washington Post* | 718,842 | 726,009 | −1.0% |
| *Detroit News* | 650,683 | 642,531 | +1.3% |
| *Chicago Sun-Times* | 639,134 | 651,579 | −1.9% |
| *Detroit Free Press* | 635,114 | 631,989 | +4.9% |

*Figures are for Monday-Friday averages for six months ending September 30 in both years, as reported to the Audit Bureau of Circulations.*

*USA Today is not included in the above ranking because its circulation totals aren't yet included in ABC reports. USA Today independently reported a paid daily circulation of 1,163,937 in September.*

## Ten largest Sunday papers

By circulation

| Paper | 1983 | 1982 | Change |
|---|---|---|---|
| *New York News* | 1,860,989 | 1,986,151 | −6.3% |
| *New York Times* | 1,523,113 | 1,498,873 | +1.6% |
| *Los Angeles Times* | 1,294,274 | 1,306,002 | −0.9% |
| *Chicago Tribune* | 1,116,403 | 1,101,615 | +1.3% |
| *Washington Post* | 996,621 | 971,957 | +2.5% |
| *Philadelphia Inquirer* | 994,966 | 1,031,321 | −3.5% |
| *Detroit News* | 858,870 | 843,580 | +1.8% |
| *Detroit Free Press* | 788,203 | 771,083 | +2.2% |
| *Boston Globe* | 781,502 | 750,308 | +4.1% |
| *San Francisco Examiner & Chronicle* | 692,406 | 680,843 | +1.7% |

*Figures are for Sunday averages for six months ending September 30 in both years, as reported to the Audit Bureau of Circulations.*

*Source: ABC Fas-Fax Report*

# Dallas, Detroit papers show gains

By ROBERT REED

Many of the nation's largest daily newspapers suffered circulation declines over the past year, but in Dallas and Detroit, two of the country's sizzling competitive newspaper markets, readership gains were scored.

Also, Gannett Co.'s *USA Today* continues to cast a shadow over some areas as that national newspaper indeed emerges as a "second buy." It has dampened the statewide sales for newspapers in Chicago and Detroit, say newspaper executives.

Preliminary circulation figures filed by publishers with the Audit Bureau of Circulations indicate that most of the big-city dailies have been hurt. These numbers, as yet unaudited by the ABC, are for the six months that ended in September and are compared to those for the same period in 1982.

The Chicago-based Tribune Co.'s *New York Daily News* suffered the biggest loss. The newspaper saw weekday figures drop 148,597 from last year's 1,544,101. The rival all-day *New York Post* had a gain of 1,958 to 962,078.

The *News'* Sunday numbers also dropped, going from 1982's 1,986,151 to 1,860,989. The *Post* does not have a Sunday edition.

Arthur Wible, exec vp-director of sales for the *Daily News*, said the decline occurred because the company is in the midst of shifting its printing facilities from midtown Manhattan to three outlying areas. He said this limited printing capabilities.

In addition, deadlines have been moved up so the *News* is not always able to supply late sports scores and other breaking news. That is hurting newsstand sales, he said.

"We told advertisers that 1983 was going to be a difficult transition year and there is still a difficult period left to go through," said Mr. Wible. "But we are certain that our readership base has not been shaken."

In an attempt to soften the impact of the reported numbers drop, the *News* has taken out ads in trade journals, claiming that ad linage figures are up 2,185,000 lines for the first nine months of this year.

The *New York Times* continues to grow, as that newpaper saw total daily circulation increase 4,863 to 910,538. The *Times* reported that 684,333 of its total comes from in and around New York City.

The *Times* recently applied with the ABC to become a national newspaper (AA, July 4); Sunday circulation leaped to 1,523,113 from 1,498,873 mainly on the strength of its national distribution. Circulation for the *Wall Street Journal*, also a national newspaper, increased from 1,925,722 to 2,020,132.

Knight-Ridder's *Detroit Free Press* went up from 631,989 to 635,114 and on Sunday climbed from 771,083 to 788,203. The *Free Press* states the nearly 4,000 gain comes from within the suburban "retail trading zone"—a designation given to certain areas by retailers and publishers using ABC numbers. But the *Free Press'* statewide sales were hindered by *USA Today* because of its emergence as a supplemental buy to the various hometown papers, according to the company.

Meanwhile, the *Detroit News* also saw its numbers jump, going from 642,531 to 650,683. Sunday circulation was boosted from 1982's level of 843,580 to 858,870. The all-day *News* recently began morning home delivery and attributes its gains to that program.

The release of the circulation numbers touched off another slugfest in Dallas where, for the first time, the *Dallas Morning News* overtook the Times Mirror-owned *Dallas Times Herald* in the daily city zone.

In total circulation, the *News* outstripped its competitor with weekday gains of 18,391, moving to 335,670. On Sunday, it had gains of 27,619, putting it at 417,474. In contrast, the *Times Herald* reported a daily gain of 185, boosting it to 269,594.

In the Dallas county zone edition, the *Times Herald* maintained a lead on Sunday. But the *News* gained 5,445 daily in the city zone compared to the *Times Herald's* loss of 3,930 daily. On Sunday, the *News* gained 11,454 compared to the *Times Herald* gain of 435.

The *Times Herald* is taking the position that the best defense is offense, so the newspaper launched an attack on the *News'* ad theme, "Nobody beats the *Dallas Morning News* in the morning." In a multimedia campaign featuring actor Mason Adams (of "Lou Grant" fame) the *Times Herald* says, "The next time the other paper says they can't be beat in the morning, don't buy it."

*Times Herald* staffers were issued promotional t-shirts bearing the slogan: "My newspaper beats them in the morning and clobbers them in the afternoon."

Not so, says the *News*, which placed ads last week claiming boldly: "We own Dallas County." A *News* spokesman said they plan to step up the "Nobody beats" theme.

In Washington, the Washington Post saw its daily circulation drop 7,167 to 718,842. The Sunday *Post* jumped from 1982's 971,957 to 996,621.

The *Philadelphia Inquirer* lost 27,842 weekdays, declining to 533,176. The Sunday *Inquirer* also saw some slippage, from 1,031,321 to 994,966.

The *Chicago Sun-Times*, which was sold last week to press baron Rupert Murdoch, saw a decline of 12,445, to 639,134.

Most of the decline comes from the newspaper's primary market area within the city of Chicago, according to ABC figures. Sunday numbers dropped from 677,681 to 669,426.

Meanwhile, the weekday *Chicago Tribune* had a decline of 7,231 to 751,024. The Sunday *Tribune* jumped from 1,101,615 to 1,116,403.

Howard Hay, vp-circulation for the Tribune, attributed nearly 4,900 of the weekday circulation decline to the newspaper's drop in statewide sales. The combination of *USA Today* and the higher unemployment that has hit the smaller cities and towns surrounding the Chicago area have cut into sales.

"In many of those smaller cities we are the second buy, and *USA Today* has affected us in those county areas," said Mr. Hay.

In Denver, where the *Denver Post* and the *Rocky Mountain News* are thrashing it out, the numbers for both have declined. The *Post* reported a drop of 8,009 to 243,428. On Sundays the *Post* lost 9,644 as it dropped to 343,943.

Competing *Rocky Mountain News*, which saw price jumps from 15¢ to 25¢ during this reporting period, dropped 4,690 to 315,524. On Sundays the newspaper climbed from 345,770 to 355,992. *USA Today's* emergence in the Denver area also had an adverse effect, said William Fletcher, general manager of the *Rocky Mountain News*.#

*Also contributing to this article: Tom Bayer, Dallas bureau chief.*

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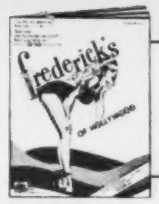
Business computers: Images change - Magazine

Cable loosening Dentsu's grip in Japan? - International section




Frederick's shares the fantasy - Page 4

# Advertising Age ®

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## *Lever Bros. on a roll*

## Dimension shampoo now heading national

**By PAT SLOAN**

NEW YORK—Lever Bros. is moving its Dimension shampoo into national distribution. When that process is complete sometime next year, the brand will be supported by an advertising and promotional budget that is expected to reach $60 million.

That would top the $50 million that Revlon has allotted for its new Hair's Daily Requirement haircare line (AA, Nov. 7).

Dimension's budget will include nearly $18 million in tv, sources say. Lever also is planning at least three freestanding inserts of 25¢-off and 30¢-off coupons in eastern newspapers in February, April and May.

Additionally, a direct-mail sampling program is expected to reach nearly 70% of all households.

Lever expects to capture 6% of the shampoo market by the end of 1984, no easy task in the already highly competitive and fragmented $1.3 billion category.

Although Lever will not confirm the rollout of Dimension, sales representatives for the company have announced the plans at several trade shows in the Northeast, where the shampoo now is being sold after earlier testing in the Midwest. Trade sources expect it

*(Continued on Page 107)*

## Sunlight next?

**By NANCY GIGES**

NEW YORK—Lever Bros. is taking a run at Procter & Gamble in another category—dishwashing products.

Lever appears to have a successful encore to Sunlight dishwashing liquid with Sunlight automatic dishwasher detergent. The new product rolled into 25% of the country this fall, primarily the West and Southwest, and is following the same upward sales path it took in test markets.

A few months after the dishwasher detergent appeared

*(Continued on Page 107)*

## More brews seen on tap at Anheuser

**By ROBERT REED**

Anheuser-Busch soon will begin selling another superpremium beer, next year will debut a new malt liquor and is looking at expanding its brand lineup further.

These moves are part of a revamped marketing strategy that will use new products as a means of protecting the No. 1 brewer's total market share within a flat beer-selling environment.

A-B will introduce the malt liquor, as yet unnamed, early next year in major cities throughout the country. It shortly will begin marketing Michelob Classic Dark at retail in parts of California.

That brew has been confined to on-premise accounts.

In addition, the St. Louis brewer is considering the marketing of an "ultra" superpremium brew and an economy-price "low-end" beer, industry sources said.

Also in the lower end, the company is stepping up assaults on the popular-price segment by expanding distribution of Busch and increasing the grass-roots selling efforts of Busch and Natural Light, a lower-price light beer (AA, Nov. 7).

These moves come at a time when the entire beer industry is anticipating flat or declining sales for the coming years. A-B has seen less sales growth for the flagship Budweiser (which sold a lofty 39 million bbls. last year), slippage of superpremium Michelob and a spotty performance from its latest —Budweiser Light.

A spokesman for A-B refused to confirm or deny the existence of the new brews, and would not comment on any other aspect of the marketing.

"Out of all the brewers, Anheuser is in the best position to come up with new products because it already has a viable premium main brand and can afford to branch out," says one brewing industry executive.

The emergence of a malt liquor marks the second go-round for A-B within that estimated 6 million bbl. subsegment. In 1971, the company entered the market with Budweiser Malt Liquor, but after a tepid two-year performance it was discontinued.

At that time, A-B said it was stopping production of Budweiser Malt because it had decided to con-

*(Continued on Page 104)*

## last minute news

### *Orion's $20 million account goes to FCB unit*

LOS ANGELES—Orion Pictures has moved its estimated $20 million ad account to FCB/Entertainment from Diener/Hauser/Bates, New York. FCB in turn drops Embassy Pictures, with estimated spending in the $5 million range. Embassy said it will begin looking for a replacement.

### *JWT picks up McCulloch; new items due in '84*

LOS ANGELES—McCulloch Corp. has named J. Walter Thompson USA as its agency, following a five-agency review in which incumbent Benton & Bowles participated. Annual budget is expected to increase to $3 million in 1984 to support the introduction of several outdoor power tools.

### *RJR's Sterling Special Blend heads into test*

WINSTON-SALEM, N.C.—R.J. Reynolds Tobacco will move into Florida test in January with Sterling Special Blend. The luxury cigaret, aimed at Philip Morris USA's Players and Benson & Hedges brands, comes in a black pack with silver-and-gray pinstriping and embossed crest. Ads for

*(Continued on Page 8)*

Both sides on syndication issue watch Congress

## Net talks stall on revenue

**By RICHARD L. GORDON**

WASHINGTON—Hollywood offered to toss overboard its demand for a share of net tv advertising profits as private summit talks with the networks intensified last week. A third closed-door session is scheduled for Nov. 18 in New York.

But the producers continued to insist on some kind of revenue-sharing commitment from the nets before they agree to allow them to resume bargaining for program ownership rights.

They and their independent tv station allies also balked again at discussing anything more than a minor syndication role—limited to educational programs—for the networks.

If an agreement can be reached, it would be the basis for rewriting the 13-year-old Federal Communications Commission rules that bar the nets from acquiring ownership or syndication rights to programs they lease from independent producers.

Though the talks continue, both sides have been waiting to see if Congress will complete action on Hollywood-backed legislation that bars FCC changing the rules for six months.

The bill cleared the House last week, but the Senate may let it dangle until after the Christmas holidays.

The Assn. of National Advertisers and the American Assn. of Advertising Agencies are on record opposing any change in the FCC rules at this time because it could jeopardize the availability of top-quality off-net shows to independent tv stations.

Motion Picture Assn. of America president Jack Valenti, a key Hollywood bargainer in the current talks,

*(Continued on Page 106)*

NEWSPAPER

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DC20014CONGLI FMJF M
CONGRESSIONAL INFO SERVICE
SRI ACQUISITIONS
4520 EAST-WEST HWY #800
WASHINGTON DC 20014

**Prime time tv demographics** Page 10

**Burnett scores at Beatrice** Page 12

**Merit cigarets on new course** Page 106

# Chicle gets direct vs. competitors

By GAY JERVEY

Warner-Lambert's American Chicle division is blasting out on several fronts, including tough competitive advertising and new products entering the turf of a major rival.

Trident mints are getting their first new national campaign since the brand was reformulated last year.

Tv spots, which have been testing in limited markets, take direct, competitive aim at both Ragold Inc.'s Velamints and Life Savers' Breath Savers mints.

The feisty push for the Trident item comes at a time when American Chicle seems to be awakening from a lull in noteworthy new-product and marketing activity.

The company is test-marketing a line of stick gums that reportedly look more than a little like those of archrival Wm. Wrigley Jr. Co., the Chicago-based gum market leader; another line of gum sold in packages of nine thin sticks, and a Hall's nasal spray extension of its Hall's cough drops in early-market stages.

All of this should catch the attention not only of consumers but also of Wall Street, which has kept only one eye on Chicle, and a half-shut one at that.

Preferring the high-tech, high-profit world of W-L's pharmaceuticals, most analysts following the company view Chicle with only a little more interest than they did Entenmann's, which W-L sold to General Foods last year.

The sale was partly in response

(Continued on Page 104)

# Atari agency shifts reflect new chief

By BOB MARICH

Financially ailing Atari has moved to a sharper definition of its advertising agency assignments, which total an estimated $100 million in billings.

The big loser in the revamp is Needham, Harper & Steers/USA, New York, dropped completely by the Warner Communications unit after it had parlayed spot assignments to an apparent fast-track position this summer.

The winners are agencies with longtime links to Philip Morris Inc. New Atari chairman James Morgan is the former marketing chief for that company's domestic tobacco products.

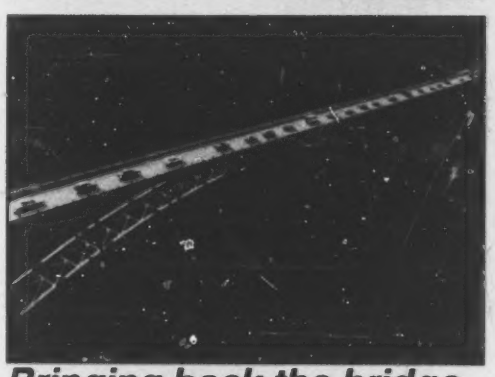
NH&S created the "Nobody's hotter than Atari this summer" campaign that ran on cable (MTV: Music Television) and some spot tv as well as on radio. That corporate project amounted to about $1 mil-

Atari recovery predicted—Page 60

lion in billings for Needham.

NH&S recently was given the new AtariSoft line—videogame and computer software designed to run on systems of Atari competitors. That plum now goes to Wells, Rich, Greene, New York, which

(Continued on Page 104)



## Bringing back the bridge

Getty Refining & Marketing returns to the scene of its original introduction of unleaded gas in 1969 to announce its move to selling only unleaded gas. The spot breaks in the Philadelphia market Nov. 15. Agency: Calet, Hirsch & Spector.

# AHP sued on Riopan ad claims

By NANCY GIGES

New York—American Home Products is once again the target of charges of misleading claims in comparative ads, this time for Riopan antacid.

William H. Rorer Inc., marketer of Maalox, the leading liquid antacid, has alleged in federal court here that AHP has increased its market share for Riopan by making false and misleading claims in advertising.

Rorer has hired the same law firm—Patterson, Belknap, Webb & Tyler—that Johnson & Johnson used in the 1970s to force AHP to stop making certain comparative claims against Tylenol in Anacin ads.

Rorer alleges that the ads convey the message that Riopan Plus is a more effective antacid than Maalox when, in fact, AHP, and its Ayerst subsidiary, which markets the brand, has only lab tests to support its claims and no tests involving humans.

While the commercials do specify that some of the claims are based on lab tests, the Rorer complaint states that consumers take away the message that the advertiser has proof that Riopan performed better in the stomachs of humans.

AHP has offered to modify its advertising to resolve the controversy and, in fact, made some changes since first Rorer objected about a year ago. But Rorer did not find those changes or those offered acceptable, according to documents supplied to the court.

Barbara Rose, Rorer director of marketing information, stated in an affidavit that AHP is gaining millions of dollars through false and deceptive advertising at the "direct expense of its competition and to the detriment of millions of Americans who use liquid antacid products." She said the market for liquid antacids is about $200 million and Maalox holds about 40% of the market, and that Riopan has grown to about 12%.

"Historically, these liquid antacids were considered by the medical profession to be 'serious medicine.' Advertising and promotion thus focused solely on health-care professionals," she said. "Having failed to make significant headway in promoting Riopan to the medical profession, Ayerst in late 1981 initiated a national campaign of tv ads."

She said Ayerst and the networks received protests

(Continued on Page 103)

# highlights

**Monday, November 14, 1983**

**A.C. Nielsen** demographic charts show "AfterMASH" to be a broad-appeal hit and "Hotel" as the female favorite. *See Page 10.*

**Beatrice Foods Co.** last week gave slices of its domestic ad business to 11 offices of five previous Beatrice agencies and two new ones. *See Page 12.*

**The Globe-Democrat**, St. Louis' 131-year-old newspaper, said it plans to fold Dec. 31, putting the city in the ranks of one-paper towns. *See Page 14.*

**Kimball International** is taking to network radio airwaves as part of an effort to expand the market for its pianos and organs. *See Page 37.*

**Pontiac** is trying to stave off the Japanese marketing shift from plain, economy cars to more sporty and expensive cars. *See Page 46.*

**Arby's has begun** limited testing of topped baked potatoes and is eyeing the rollout of a croissant breakfast menu. *See Page 48.*

**Booth Fisheries** is likely to get an infusion of marketing support from its new owner, Rich-SeaPack Corp. *See Page 52.*

**Warner Communications'** Atari seems on the way to recovery through gains in software sales, according to Wall Street analysts. *See Page 60.*

**Body sprays**: New entries in Canada make some marketers wonder if more are destined for the U.S. *See Page 83.*

**Playboy Enterprises** is anticipating increased profits next year for its publishing and products divisions. *See Page 90.*

**USA Today** will release its first state-by-state circulation figures this week and will increase its rates Jan. 1. *See Page 92.*

**General Host's** Tambellini Foods division is introducing a new 12-item frozen entree line aimed at budget-minded gourmets. *See Page 100.*

## CORPORATE CLOSEUP

**Frederick's of Hollywood** is holding its own against the proliferation of competitors in the intimate apparel market. *See Page 4.*

## INTERNATIONAL

**Grandfield Rork Collins** is planning to link with a U.S. agency as part of a new international network. The network mainly will handle the agency's latest international account, Commodore International. *See Page 66.*

**Eurocom**, the giant French agency holding company, needs to enter the U.S. market in order to service accounts of its French and other European clients expanding internationally. *See Page 66.*

**H.J. Heinz Co.** is gambling that the struggling baby food market in Italy will come back. That's the reason for purchasing the baby food division of Industria Buitoni Perugina. *See Page 68.*

## VIDEOTECH

**Interest in tv listings** remains high, despite the demise of *TV-Cable Week* and the hegemony of TV Guide. *See Page 74.*

**ABC News** is planning to trim staff and cut back program time in several areas, including "Nightline." *See Page 77.*

**MCA TV** has been paid record prices for an hourlong off-network series in its initial sales of "Magnum, P.I." *See Page 80.*

**Playboy Video Corp.** has taken over complete ownership of the Playboy Channel. *See Page 80.*

## MAGAZINE

**Advertising giant** John Caples goes back to the basics in an excerpt from his book, "How to Make Your Advertising Make Money." *See Page M-4.*

**Business Computers**: While micros and macros learn to communicate with each other in the office, marketers of computers for business applications are learning how to communicate with buyers. *See Page M-9.*

**The power** of the networks' tv censors over what is an acceptable commercial is the cause of great displeasure for agency folk, and evokes a broad spectrum of comment. *See Page M-42.*

## REGULAR FEATURES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# Sweeps: ABC wins first week

By DIANE MERMIGAS

ABC blasted its way into the November sweeps period by winning the first full week on the strength of its Wednesday, Saturday and Sunday series while closing the gap on CBS' season-to-date lead.

But the network competition was expected to get much tougher heading into the season's seventh week after more widespread stunting (preempting of regularly scheduled shows).

For the first eight days of the November ratings sweeps, ABC led the prime time ratings, although CBS was not far behind.

The week ended Nov. 6 marked ABC's second weekly win of the season since its World Series telecasts dominated prime time the week ended Oct. 16. CBS has won the remaining four weeks.

ABC claims it is the only network to show over-all prime time ratings improvement over the first six weeks of last season. ABC is up 1.3 points to a 17.6 ratings average this season. CBS has only a 0.1 point drop, and NBC's average rating for the season has dropped 1.3 points to an average 15.1.

What put ABC over the top in the sixth week was the strong Nov.

(Continued on Page 108)